Direct Secure Messaging

End User Manual

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Revision History

Name	*Date*	*Reason For Changes*	*Version*
Tami Jones	April 1, 2013	Direct Secure Messaging User Manual	1.0

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Direct Secure Messaging 1.0

Introduction

Direct Secure Messaging (Secure Messaging) utilizes national standards to communicate health information between healthcare organizations, providers and patients. Secure Messaging is an easy-to-use, secure communication method that replaces mail and fax transmissions between known parties, such as providers, labs, and public health departments. Key feature and functions of Direct Secure Messaging are:

- Ability to easily send encrypted messages between Orion Health HISP subscribers and non-Orion subscribers (trusted HISPs, e.g. HealthVault)
- Direct Message Portal (webmail)
- "New Secure Mail" notifications sent to a non-secure email address

Purpose

The purpose of this document is to identify the key concepts within Direct Secure Messaging that will allow the user to effectively utilize the application. Specifically, this document provides Direct Secure Messaging End User details.

Disclaimer

All patient identifiers, contact details and medical conditions represented in the screenshots and presentations shown in this manual are fictitious to the best knowledge of Orion Health™ (Orion Health), and do not relate to a real person or persons.

The screenshots and presentations shown are intended as examples only, and may differ from the actual screenshots and presentations generated by the released product in commercial production.

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Getting Acquainted with the User Interface

Logging into HIE Clinical Portal

The HIE Clinical Portal Login screen is shown below. A username and password are required to gain access to the application. A temporary password will be assigned when the account is established. Once the user has entered the username and temporary password the system will prompt the user to change the password. **Note:** The username is not case-sensitive, the password is case-sensitive.

HIE Clinical Portal Login Screen

Logging out of HIE Clinical Portal

The **Logout** button is used to exit the HIE Clinical Portal. It is located in the upper portion of the menu bar, just above the **Patients** menu.

Logout Button

It is important to use the **Logout** button as opposed to clicking on the X button located in the upper right hand corner of the browser. The logout button will log the user out of the system. If it is not used, the session will remain active for a pre-defined period of time before the auto-logout feature is activated.

Automatic Logout

The inactivity timeout feature in HIE Clinical Portal ensures robust security by logging out the user if he or she has been inactive for a pre-defined set of time. The inactivity timeout period is currently set to 30 minutes but may be edited by the user on the **My Details** screen. See **The My Details** section of this document for more information. The timeout period may be set to a lower amount of time than set by the HIE, but not more.

The screen below provides an example of the warning a user may see if the user has been inactive for a set period of time.

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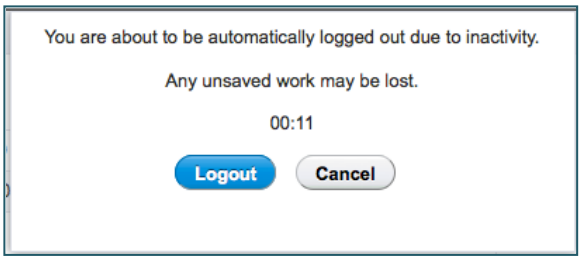

Automatic Logout

Clicking cancel will allow the user to remain active.

User Homepage

The **User Homepage** automatically appears when a user logs into HIE Clinical Portal. It displays summary information relevant to the user.

The layout of each user's homepage is composed of one or many windowlets. Windowlets allow a screen to be partitioned allowing a user to see more than one view on a single screen. The homepage defaults to the screen:

Homepage Screen

Homepage Screen

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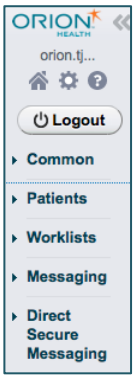
Menu Bar

Found on the left hand side of the HIE Clinical Portal window, it is the primary navigation method. Each menu contains one or more icons which are graphical links to entry points (screens). Access to menus and items within it are dependent on access privileges granted to the user.



The Menu Bar

If more icons are available than can be displayed, **Up** and **Down** scroll arrows will become available.

The following menus are available:

Menu	Description	Entry Point (Screen)
Common	Maintain user details	• My Details • Worklists
Patients	Locate a patient's medical records	• Recent Patients • Worklists
Worklists	Worklists allow users to quickly access and manage patient records that may be of special interest	• Red • Blue • Yellow • Greeen • Orange • Purple
Messaging	Compose, receive and send messages to other clinical users and receive detailed notification messages	• New Message • Received Messages • Sent Messages
Direct Secure Messaging	Compose, receive and send messages to other Direct Secure Mail users.	• Secure Mail

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Icons

Icon	Function	Description
	Autohide	Hide the menu bar, making more screen space available for viewing user information
	Home	Displays the User Search Homepage
	Settings	Displays My Details screen
	Help	Provides context specific help

Additional Menu Bar Elements

Element	Description
<username>	The HIE Portal user name.
	End the current HIE Portal session.

Shortcut Keys

The following shortcut keys are available:

Keys	Description
F11	Toggles between a full screen and a standard Windows ® display. This feature is not available on Mac OS machines.
F5	Refreshes the screen display.
Tab	Moves to the next field on a screen.
Shift+Tab	Moves to the previous field on a screen.
Enter	Activates the current selected button or option.

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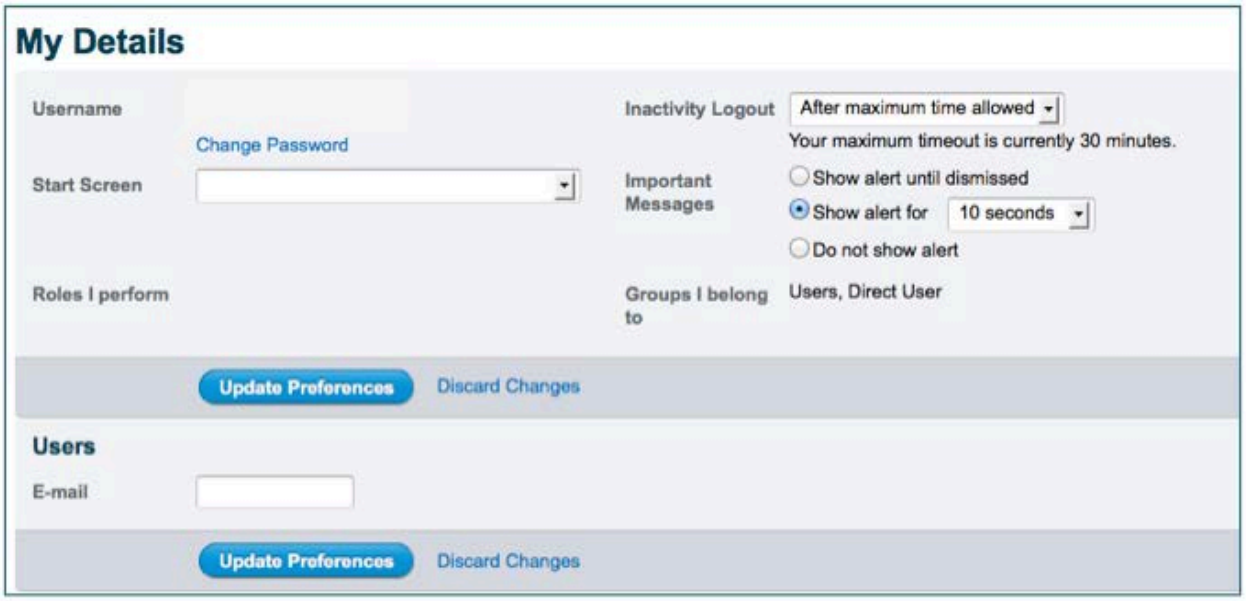
Common

My Details

My Details is located in the **Common** tab of the menu bar. It allows the user to change passwords, set the inactivity timeout period, and select or enter information in the **My Attributes** section.

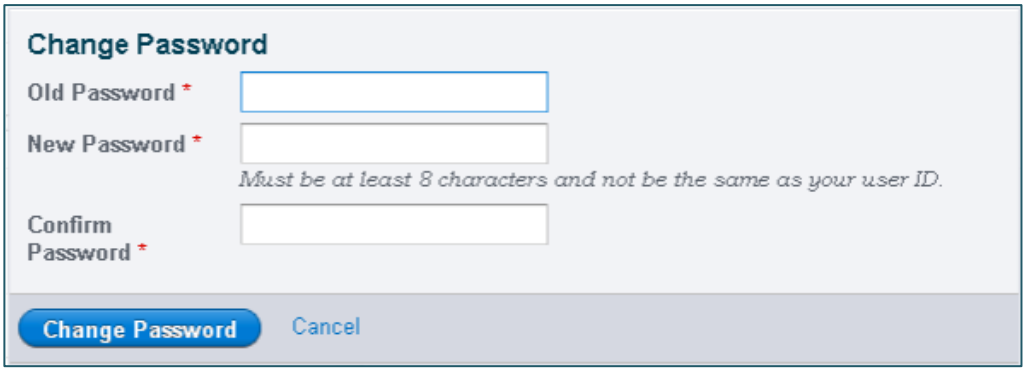


My Details Screen

The following fields are available on the **My Details** page:

Change My Password

Selecting the **Change Password** button allows a user to change his or her user password.


Change Password
Old Password *
New Password *
Must be at least 8 characters and not be the same as your user ID.
Confirm Password *
Change Password
Cancel

Password Change

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Password Policy

The password policy for all users is as follows:

- Passwords must be at least 8 characters long, have at least one number, one symbol (e.g. #, $,%), one capital letter and not match any previous passwords
- Password will expire every 90 days for all users
- Passwords must be 'strong'. **Note:** the method for determining password strength is documented in detail in the Solution Design document.
- Accounts will be locked out after 5 bad login attempts (counter and account reset after 15 minutes)

Homepage

Select the format of the homepage (Start Screen) to display following login.

Inactivity Timeout

In order to provide a secure environment, a default timeout of 30 minutes has been set by the administrator. On this screen, a user can set up an inactivity timeout period for his/her account that is less than the 30 minute maximum timeout. This setting ensures that the user will be logged out of HIE Portal if he/she does not use his/her computer for the number of minutes equal to the inactivity timeout value.

- If a timeout of less than 30 minutes is preferred by the user, he or she can re-set the timeout to 2, 3, 4, 5, 10, 15 or 20 minutes.
- HIE Portal counts mouse movement over the menu or context bar as activity. As such, if a user is viewing a document and the mouse pointer does not move over these areas, a timeout may be triggered.

Important Message Notification

An important message is one that has been tagged important by the user who sent it. The HIE Portal user who receives the message will see an alert at the bottom of the screen. The message that displays is based on the alert selected on the **My Details** screen. The following options are available:

- **Show alert until dismissed**: If selected, displays the message until the alert is closed by the user
- **Show alert for <n> seconds**: If selected, displays the message for the set number of seconds
- **Do not show alert**: If selected, the important message alert will never be displayed

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- **Use default (Display for <n> seconds)**: If selected, displays for the period of time set by the administrator

An example of the message notification is provided below:

Important Message Notification

Roles I Perform

This section lists the user's role membership which determines access to the portal screen and functions.

Groups I Belong To

This section lists the user's group membership which determines access to the different portal screens and functions.

Additional Attributes

Group attributes may be added to a group to allow an administrator to gather additional information about the user or to provide additional features to the user. The following attributes have been pre-configured for a user:

Users

This field displays the user's email address.

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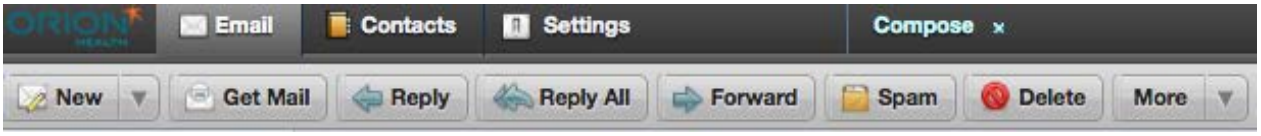
Direct Secure Messaging

Once a **Direct mailbox** has been established by the DSM Administrator, the user may access the **Secure Mail** feature. **Secure Mail** is used to information via Direct (an encrypted email delivery channel) manually to a trusted provider. The **Send to Direct** functionality is not automatically enabled and must be enabled and configured by an Administrator. The DSM Administrator will assign, register and grant permission to the user in order for the user to send and receive secure messages via the Direct Secure Email system.

Click **Secure Mail** to access the **Direct Mailbox.**

Secure Mailbox Icons



Email: Email section of the mailbox
Contacts: Saved Email contacts
Settings: Webmail, Anti-Spam, Email Filters and Mail Options settings
New: Select Email or Contact from the dropdown
Get Mail: Refreshes Inbox
Reply: Reply to sender of active email
Reply All: Reply to all email addresses on the email distribution (cc's and bcc's included)
Forward: Forward active email to another recipient
Spam: Move active (checked) email(s) to the Spam folder. **Note:** A user should never receive Spam emails, as DSM is a secure network. However, should something appear in this folder, please contact the network administrator.
Delete: Deletes active (checked) email(s) and moves into Trash folder
More: Select from dropdowns including:

- Select All: Allows user to Select All emails that have been received or sent.
- Deselect: Allows user to Deselect items selected
- Flag: Allows user to Flag emails to stand out
- Remove Flag: Allows user to Remove Flags previously selected
- Mark as Read: Allows user to mark emails received as Read
- Mark as Unread: Allows user to mark emails as Unread

Compose: Tab signifies a new message in the draft stage (without subject) and can be deleted by clicking the 'X' to the right of **Compose**

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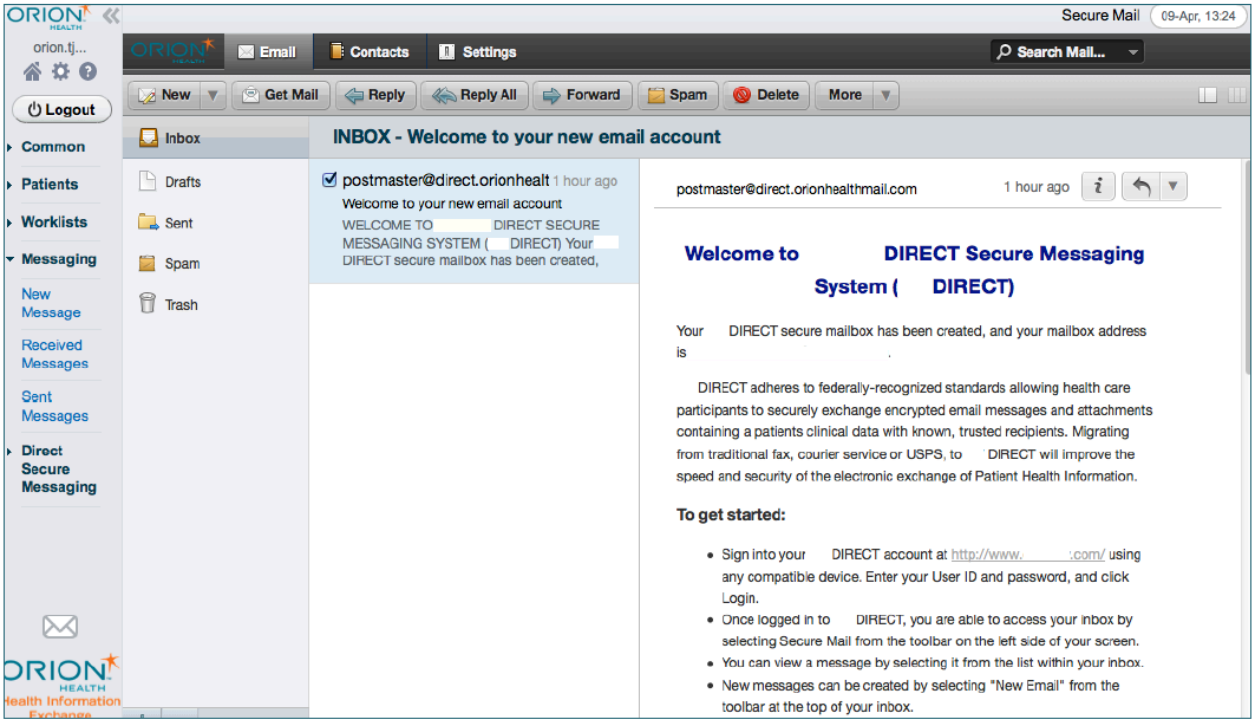
Working With Messages

This section describes working with messages. Sending, receiving and forwarding messages and attachments will make up the bulk of user work with Secure Messaging.

Inbox

The **Direct Secure Message Inbox** houses user email messages and will display when first received. **Direct Secure Messaging** is set up just like most email systems.


Secure Mail
09-Apr, 13:24
Email
Contacts
Settings
Search Mail...
New
Get Mail
Reply
Reply All
Forward
Spam
Delete
More
Logout
Common
Patients
Worklists
Messaging
New Message
Received Messages
Sent Messages
Direct Secure Messaging
Inbox
Drafts
Sent
Spam
Trash
INBOX - Welcome to your new email account
postmaster@direct.orionhealt 1 hour ago
Welcome to your new email account
WELCOME TO DIRECT SECURE MESSAGING SYSTEM (DIRECT) Your DIRECT secure mailbox has been created,
postmaster@direct.orionhealthmail.com
1 hour ago
Welcome to DIRECT Secure Messaging System (DIRECT)
Your DIRECT secure mailbox has been created, and your mailbox address is
DIRECT adheres to federally-recognized standards allowing health care participants to securely exchange encrypted email messages and attachments containing a patients clinical data with known, trusted recipients. Migrating from traditional fax, courier service or USPS, to DIRECT will improve the speed and security of the electronic exchange of Patient Health Information.
To get started:
Sign into your DIRECT account at http://www. .com/ using any compatible device. Enter your User ID and password, and click Login.
Once logged in to DIRECT, you are able to access your inbox by selecting Secure Mail from the toolbar on the left side of your screen.
You can view a message by selecting it from the list within your inbox.
New messages can be created by selecting "New Email" from the toolbar at the top of your inbox.

DSM Inbox

To access the Message Inbox, navigate to **Inbox**. Messages in the Message Inbox are displayed as **Unread** messages in **bold text** and all messages are sorted in descending date order.

Click the **Get Mail** icon to refresh the mailbox.

Read and reply to a message

1. Navigate to the Message **Inbox**.
2. Select a message to open. The message displays in the right pane.
3. A message will be marked as read 3 seconds after selection. A User may mark the message as **Unread** again by selecting the **Mark as Unread** dropdown of the **More** tab

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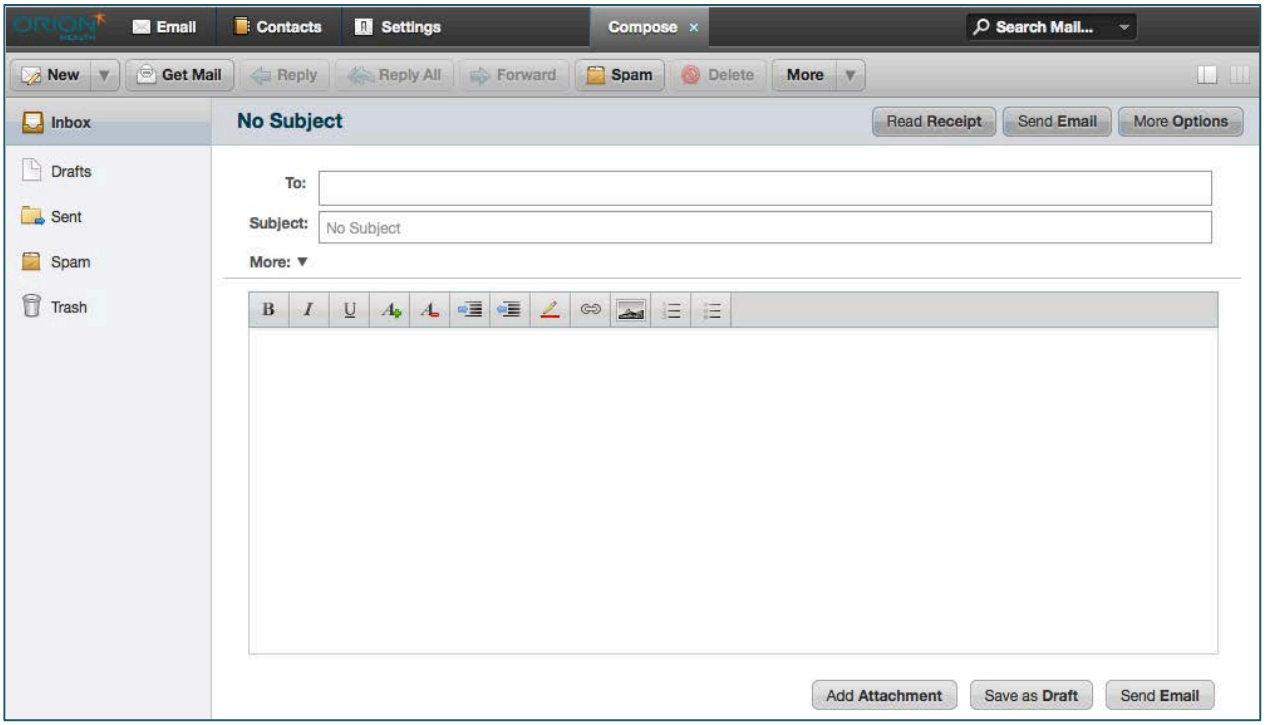
4. To display message details such as who the message is from, the subject of the message and the date the message was sent, select the **Display Message Information** icon. Click again to collapse the message details
5. Select the **Reply** button (in the top navigation bar or the icon above the message) to reply to the sender of the message, or the **Reply All** button (or open the **Reply** dropdown) to reply to all recipients included in the original email.
6. Enter the message.
7. Click the **Send My Reply**, **Save As Draft**, or **Add Attachment** button. The replied to message will remain in the inbox and it will display a **Replied** icon next to the email.
8. Select **Toggle Threads** to reveal all emails in the thread, or **Collapse Threads** to stack messages in the thread. To view an individual message within the thread, click on the bolded sender name to reveal the message. Select **Quoted Text** if available to reveal original email.
9. Standard editing options are available in the message body such as, font changes, insert hyperlink, add image, bullet and numbering.



DSM New Email

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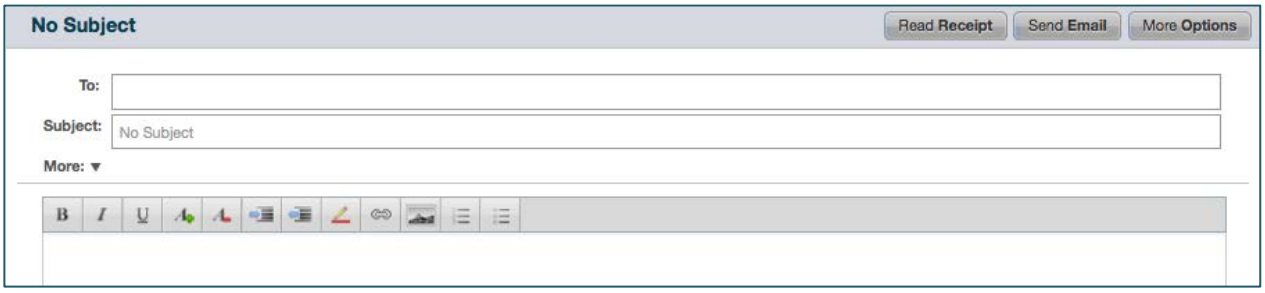
Send a new message

To compose a new message:

1. Select the **New>New Email** button. The **New Message** screen displays in a new tab:



2. Complete the required fields in the message such as **To**, **Subject** and the **Message** body. By clicking **More**, additional fields are revealed for entry such as **CC** and **BCC**.
    - **CC:** Carbon Copy; to send an email to another per on besides the recipient
    - **BCC:** Blink Carbon Copy; to send an email to another person without any of the other recipients being notified
    - **Files:** A list of the files attached to the message. The **Files** field will contain any attachments to the Message with the ability to delete the file prior to sending if necessary.

3. Selecting the **Read Receipt** option notifies the sender when the recipient has opened the message. If the sender asks to be notified, the subject line of the message will be preceded with the word **Read:** for example, **Read: John Cardinal**
4. Add an attachment, if desired. To do so, select the **Add Attachment** button, and select the correct file from the library.
5. Select the **Send Email** button to send the message, or the **Save as Draft** button.

At any point, a message can be saved as a draft by clicking **Save As Draft** button. The message will be stored in the **Draft Messages** folder. By default, a message is automatically saved as a draft every two minutes.

Once a message has been sent it cannot be recalled. A copy of the message will be stored in the **Sent** folder.

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Send a Group Message

Rather than add email addresses to a message one by one, you may send a message to an entire group at once. To send a message to a contact group:

1. Navigate to **Contacts>[Contact List group]** and click on the contact group to add to the email
2. Click the **More** button and **Select All** (all email addresses in the group are selected)
3. Click the **Mail** button and a new message screen displays with all selected contacts in the **To** field
4. Complete the email as usual, as described previously
5. Click the **Send Email** button

Forward A Message

To forward a message:

1. Navigate to the Message Inbox by selecting **Direct Secure Messaging>Inbox**.
2. Select a message to open it. The message displays in the right pane.
3. Select the **Forward** button. The **Forward Message** screen opens, containing all the information included in the original email.
4. Enter a new recipient, or recipients, in the **To** field.

⚠ **Note:** Forwarded messages do not include any recipients of the original message in the **To** field.

5. Write the email as described in **Sending New Messages**. All attachments in the original message will be included in the forwarded message by default. The attachments may be removed or new ones added.
6. Select the **Send Email** button to send the message, or the **Save as Draft** button
7. The forwarded message will remain in the inbox and will display a **Forwarded** icon

Downloading or Printing a Message

To print or download a message:

1. Navigate to **Inbox** and select the message to print or download
2. Open the **Reply** dropdown list by clicking on the Expand icon and select either **Download or Print**
3. A dialog box will display, prompting the user download or print the message.

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Opening and Downloading an Attachment from a Message

When a message is received with an attachment, the **Attachment** icon is displayed next to the message.

To open the attachment:

1. Navigate to **Inbox** and select the message containing the attachment.

2. Open the **Reply** dropdown list by clokcin on the Expand icon and select **Download**
3. User will be prompted to open or save the attachment.

Draft Messages

Draft Messages are messages which have been composed, but not sent. To save a message as a draft, click the **Save as Draft** button. The message is then sent to your drafts folder. By default, a message is automatically saved as a draft every two minutes. To view a draft message:

1. Navigate to **Drafts** folder, a list of messages will display
2. Select a message to read
3. A user may work with the message as described in **Sending a New Message** section or delete the Draft. The user may also print of download the email by clicking the **Reply** icon.

Sent Messages

Sent Messages are messages which have been composed, and sent by the user. To view a Sent message:

1. Navigate to **Sent** folder, a list of messages will display
2. Select a message to read
3. A user may work with the message as described in **Sending a New Message** section or delete the Draft. The user may also print of download the email by clicking the **Reply** icon.

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Spam Messages

Spam Messages are messages the user does not wish to receive. Because DSM is a secure system, users should never receive an unwanted message. In the event a user does receive a 'spam' message, the user should contact the DSM Administrator. To mark a message as spam:

1. Navigate to **Inbox** folder, a list of messages will display
2. Select a message mark as spam
3. Click on the **Spam** button on the top navigation bar
4. The message will be moved into the Spam folder.

A user may work with the spam message as described in **Sending a New Message** section, delete the message or restore the message. To restore the spam message:

1. Navigate to the **Spam** folder, a list of messages will display
2. Click on the message to restore
3. Drag the message into the **Inbox**

Emptying the Spam Folder

Messages will remain the the Spam folder until the user erases the messages or empties the Spam Folder. To empty the Spam folder:

1. Navigate to the **Spam** folder
2. Select message(s) to delete and click the **Erase** button, OR
3. Click the **Empty** button to delete all messages in the **Spam** folder

Deleting a Message

Users may delete a message at any point by selecting the message, then the **Delete** button. The message is then moved into the **Trash** folder. Deleted messages are stored in the **Trash** folder and may be viewed or moved back to the Sent or Inbox folders. Individual messages can be **Erased** from the Trash folder or the entire Trash folder can be deleted permanently using the **Empty** link.

As Secure Mail messages may represent Personal Health Information or medical documents, all messages are archived. If a deleted message must be retrieved, contact the DSM Administrator.

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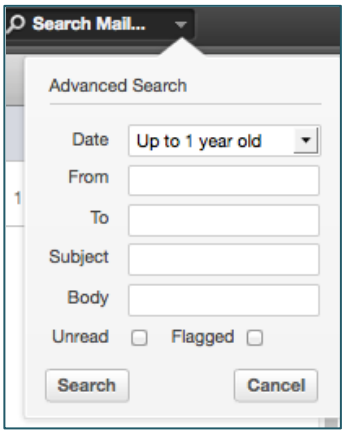
Search Email

Within the Direct mailbox, a user may search for mail by typing text in the search box, or selecting the Advanced Search dropdown. The Advanced Search options are Date, To, From, Subject, Body, Unread and Flagged. Select one or more of the search criteria and click Search to return results that meet the Advanced Search criteria.



Adding and Deleting Folders

Folders allow a user to sort and manage email. Default folders display to the left of the Message Inbox. Default folders are:

- Inbox
- Drafts
- Sent
- Spam
- Trash

Using the mouse, users may drag and drop messages from one folder to another. Email filters may also be used to sort messages into folders automatically. To add or delete folders:

1. Click the Add (or Delete) Folder button (+ or -) at the bottom of the folders pane.
2. Name the folder (required to Add folder)
3. If a sub-folder is required, select the Folder and click the (+) Add Subfolder button.
4. Name the sub-folder
5. To Delete folder or subfolder, click the Delete (-) Folder button. Deleting a folder will also move all messages within the folder to the **Trash** folder.

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Contacts

The Contacts tab houses and manages email addresses and contact information to be used within Direct Secure Messaging. Users may store individual contacts, create distribution lists and import or export existing contacts. Clicking the Sync button in the top navigation bar when the **Contacts** tab is active may access additional information regarding the use of the Contacts functions. **Contacts** allows the user to view Contacts (Email Addresses) that are in the system (local domain users). The DSM **Contacts** function has a number of pre-configured groups that the user can use, but cannot delete. At the same time, a user may create groups for individual use.

In DSM, the user can access the **Contact Lists** by clicking in **Secure Mail>Contacts.** Contact lists are a means by which the user can group Email Addresses and find them easily. The list is not a distribution list or a group email list, but a user identified list that the user can categorize Email Addresses.

By using the **More** button the user can select all Email Addresses in the group, then select the **Mail** button and the system will create a new Email with all the Email Addresses in the **To**: field. A Contact list can be used in this manner as a Distribution List if required.

Below is a description of the preconfigured Contact Lists that the user will see when first viewing their Contacts page. They do not need to be used, but they cannot be permanently deleted.

- **Personal**: Preconfigured personal list that a user can add Email Addresses to for personal use. No other user has access to this list.
- **Global**: Preconfigured list that contains all the local Email Addresses in the system. This list is displayed to all users and cannot be copied from this list into other lists.
- **Shared**: Preconfigured list that a user can share with other users. To share with another user:
    1. Navigate to **Contacts** and select the **Shared** list
    2. Select a contact and click the **Edit** button. The Edit screen displays
    3. Turn on **Shared Contact** and add at least on user email address (**Permissions** field) to share the contact with. A smart list will display as the username is typed into this field.
    4. Click the **Save Contact** button to share

- **Remembered**: Preconfigured list that stores all Email Addresses that have been typed into an Email and subsequently sent the email. This list only remembers Email Addresses that are not already in other folders.
- **Favorites**: Preconfigured list that can be used by the user for any purpose, and is another example of a list.
- **+ -** : These symbols allow the user to create more folders or delete folders they no longer require. When creating a folder, with the + symbol or the button, the user

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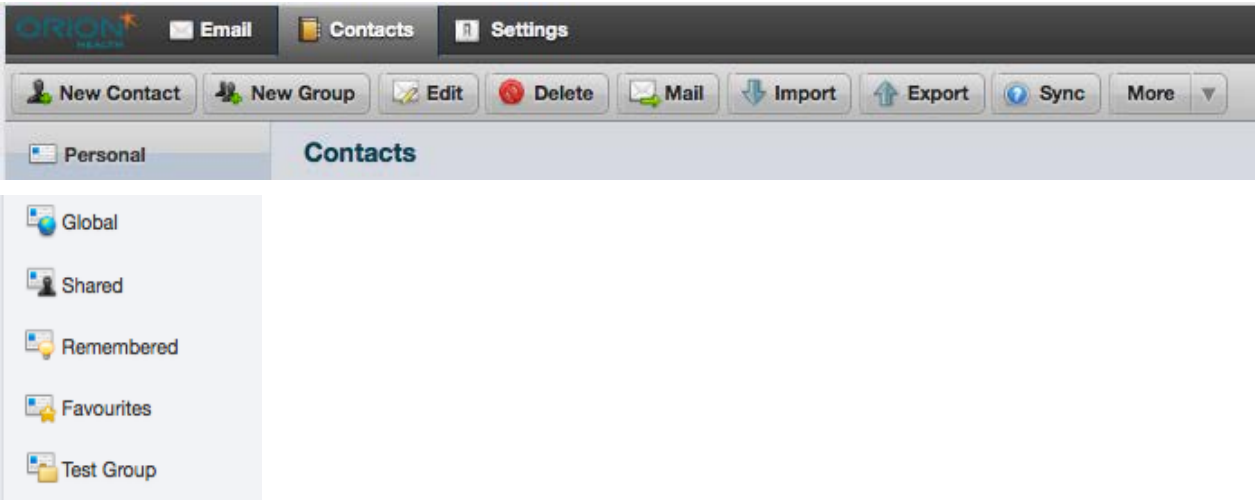
can give any name to the folder. Some special characters are not allowed in the name.

If the user deletes the Global, Shared, Remembered or favorites Contact Lists, the system will re-instate these folders the next time the user logs on.



Add, Edit, Delete contacts

A user may send a message to an email address which is not in the contact list by typing an address in the **To**, **CC** or **BCC** fields. Secure messaging will automatically save these email address as Contacts in the **Remembered** folder. To add a new contact, click the **New Contact** button and type the contact's information in the appropriate fields. Additional information may be added using the **More Information** menu, and choose whether to share the contact with other Atmail users with the **Shared Permissions** menu. Click the **Save Contact** button to save the contact to the selected address book.

To Edit the Contact, navigate to the **Contacts** screen and select a contact. Click the **Edit** button to make required changes to the contact and click **Save Contact** button.

To Delete the Contact, navigate to the **Contacts** screen and select a contact. Click the **Delete** button to remove the contact. No warning will be displayed and the contact is deleted without a prompt.

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Adding more fields

A user can create fields for multiple email addresses, phone numbers, and other information using the green plus sign (+) buttons by each input field. Click the green plus sign (+) to create a new field, enter the appropriate information, and select options from the drop-down menus. Fields may be removed from a contact by clicking the red minus sign (-) next to the field. Click on **Save Contact** when finished to save the additional information.

Adding a new group

Click the **New Group** button to create a new **Contact** group and name the new Contact group folder. User may add contacts to groups by dragging their names from the contact list in the middle pane to the group's folder in the left pane.

To Delete a Contact List, select the list and click the Delete (-) button.

Deleting Remembered or Sticky Email Addresses

As with all email systems, users send messages to many email address that are not in their contacts or address book and the system will 'remember' these email addresses. These **Remembered** email addresses are sometimes referred to as **Sticky** email addresses or **Saved** email addresses and are normally automatically displayed when the user starts typing in an email address in the To, CC or BCC lines in the email.

Some systems store these addresses in the contacts / address book lists, and others place these addresses in a separate file on the system. Orion Health's system stores these emails in the Contacts list under the **Remembered** folder.

As a user may type in the wrong email address, or the email address may no longer exist, users may want to delete these **Remembered** or **Sticky** addresses at some stage. To delete these old **Remembered** or old **Sticky** email addresses in the Orion Health's system the user must:

- Go into the Contacts list via the menu button on the top of the DIRECT Secure Messaging screen
- Select the **Remembered** folder on the left hand menu
- De-select the top Direct Email address that is selected by default
- Select the Direct Email address(es) to delete
- Select the **Delete** button from the menu bar (second from the top)
- The entry is deleted with no prompt

When a new email is started this deleted **Remembered** Direct Email address will **not** be displayed. Be aware that any saved draft emails may still display the deleted address. Only newly started emails (after the delete process) that will not display the deleted email address.

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Exporting and Importing Contacts

A user may import or export contacts in *vcard.vcf* format. A vcf or vCard is an electronic business card. The standard format allows data to be shared between different mail programs.

DSM supports the vCard format for address book import and export. To save contacts to a vCard file, select the check-boxes next to the contacts you'd like to export, then click the "Export" button. Select the name and location to save your .vcf (vCard) file and confirm (e.g. Outlook). To import contacts from a vCard file, click "Import" and choose the .vcf file from the file selection dialog. Click the **More** button and select **Export All** to export all users in a contact list.

Sync

The **Sync** link provides **Email, Address Book** and **Settings** help. Some features and options accessed from the **Sync** link may not be available to all users.

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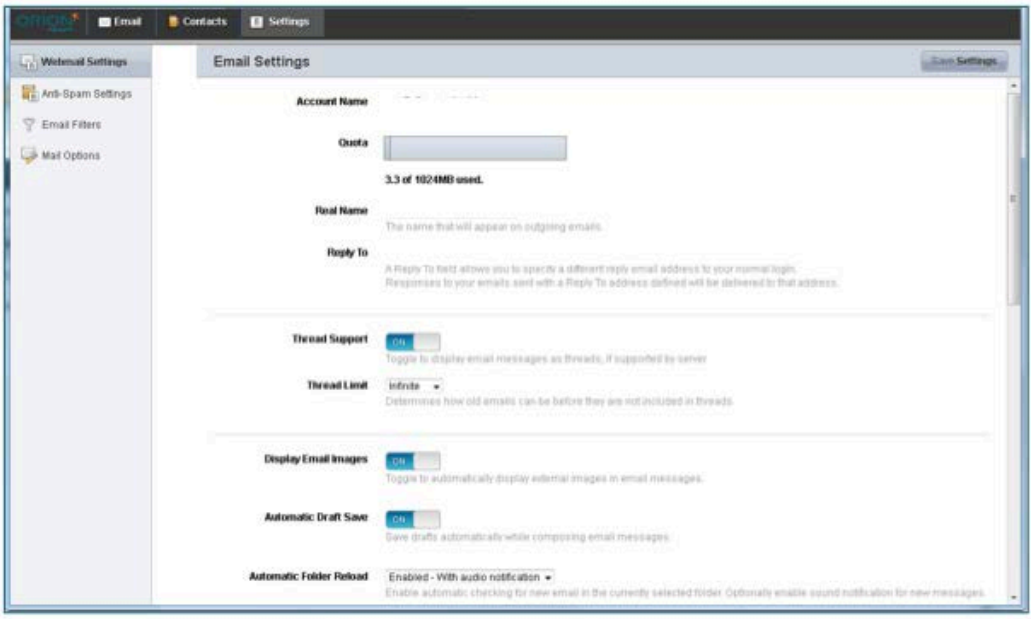
Settings

DSM allows the user to customize the look, feel and performance of DSM using the Settings screens. The following settings folders are available:

- Webmail Settings
- Anti-Spam Settings
- Email Filters
- Mail Options

Webmail Settings

To access Webmail Settings navigate to Settings tab>Webmail Settings folder.



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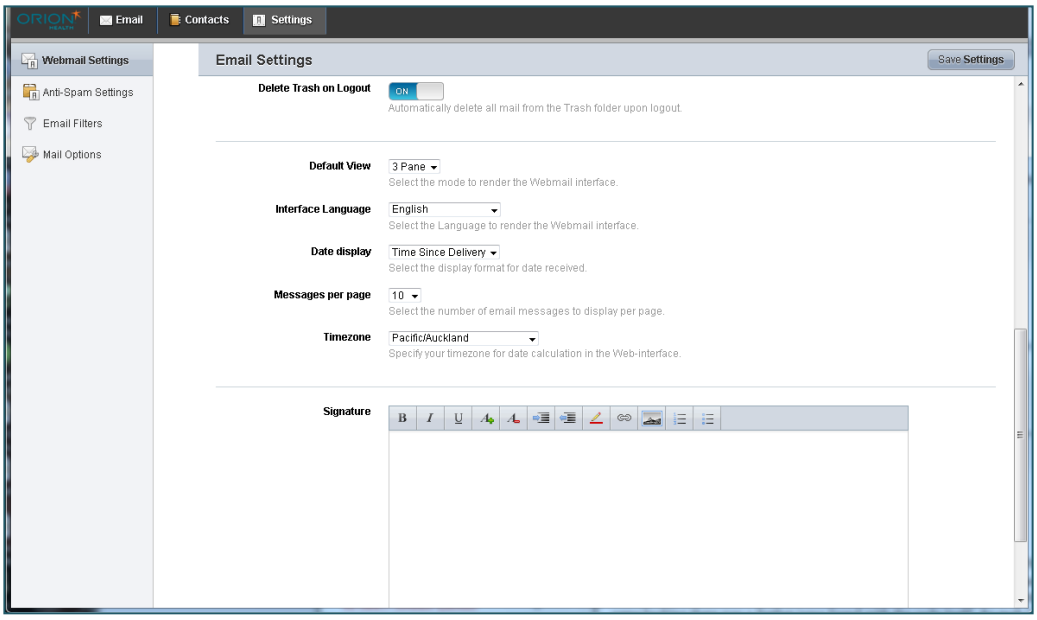

The following fields are available to view and/or edit:

Account Name: Displays email account name.

Real Name: This will appear in the **Sender** field of sent emails before the email address.

Reply To: Specify an email address for replies to be sent to, instead of the email address used to log in.

Thread Support: Check this box to display email conversations as threads.

Thread Limit: Select from dropdown age of email to be included or excluded from thread. Available options are 3 months, 6 months, 1 year, 2 years or infinite.

Display Email Images: Select to display extermal images in email messages rather than as an attachment.

Automatic Draft Save: Select to automatically save draft emails while composing, default is every 2 minutes.

Automatic Folder Reload: Select to enable auto reload and/or sound notifications

Delete Trash on Logout: Select to automatically delete all mail from Trash folder upon logout

Default View: Select 2 pane or 3 pane view

Interface Language: Select preferred language for the Webmail interface.

Date Display: Select display format for date received on email headers (MM/DD/YY or DD/MM/YY)

Messages per page: Select the number of simultaneous messages to display in the Webmail interface. Reduce the number if the user connection is slow.

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Timezone: Specify the time-zone for user location.

Signature: Specify a message that will be added to the end of every email sent from Webmail. Options include plain text or HTML for the signature.

After modification of settings, click the **Save Settings** button to preserve Webmail Settings.

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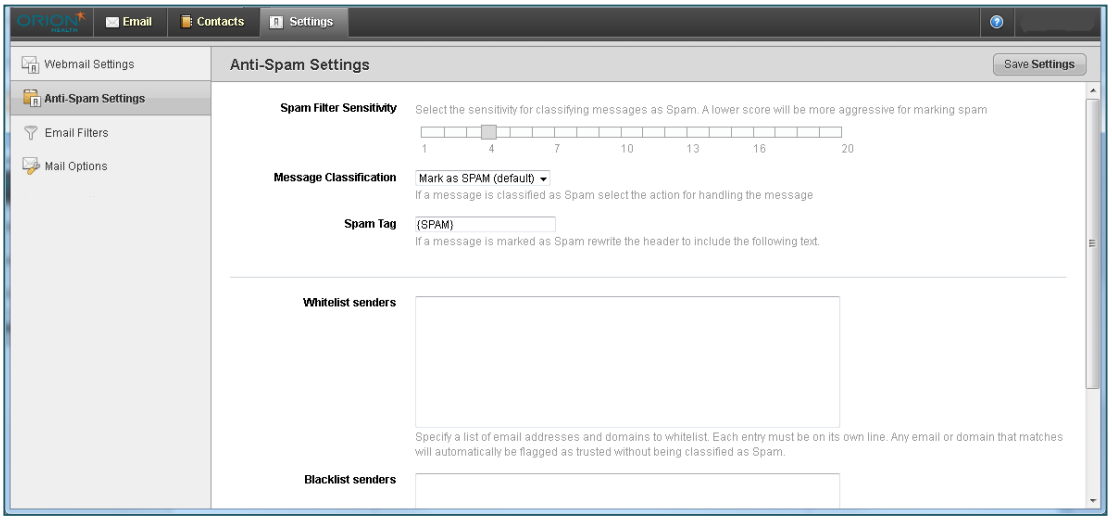
Anti-Spam Settings

As the DIRECT system is a Trusted network of Email providers, a user should never get any spam emails in this folder unless a filter has been set up to move emails in this folder. Changing the standard settings is not recommended.


Email
Contacts
Settings
Webmail Settings
Anti-Spam Settings
Email Filters
Mail Options
Anti-Spam Settings
Save Settings
Spam Filter Sensitivity
Select the sensitivity for classifying messages as Spam. A lower score will be more aggressive for marking spam
1 4 7 10 13 16 20
Message Classification
Mark as SPAM (default)
If a message is classified as Spam select the action for handling the message
Spam Tag
{SPAM}
If a message is marked as Spam rewrite the header to include the following text.
Whitelist senders
Specify a list of email addresses and domains to whitelist. Each entry must be on its own line. Any email or domain that matches will automatically be flagged as trusted without being classified as Spam.
Blacklist senders

The following options are available if the user opts to change the settings:

Spam Filter Sensitivity: Set the degree (1-20) to which the spam filter looks for spam within emails. A lower score indicates more aggressive spam marking.

Message Classification: The default action to take on emails that are classified as spam. (Mark as Spam, Move to Spam Folder, Purge Message)

Spam Tag: The wording to be added to the email header if an email is considered to be spam.

Whitelist senders: Senders or sender domains that send emails but the spam filter picks up as spam. Placed in this field, all emails from these senders or sender domains are delivered regardless of their content.

Blacklist senders: Senders or sender domains that are believed to be sending spam. Senders or sender domains placed in this field will be blocked.

After changing settings, click **Save Settings** button.

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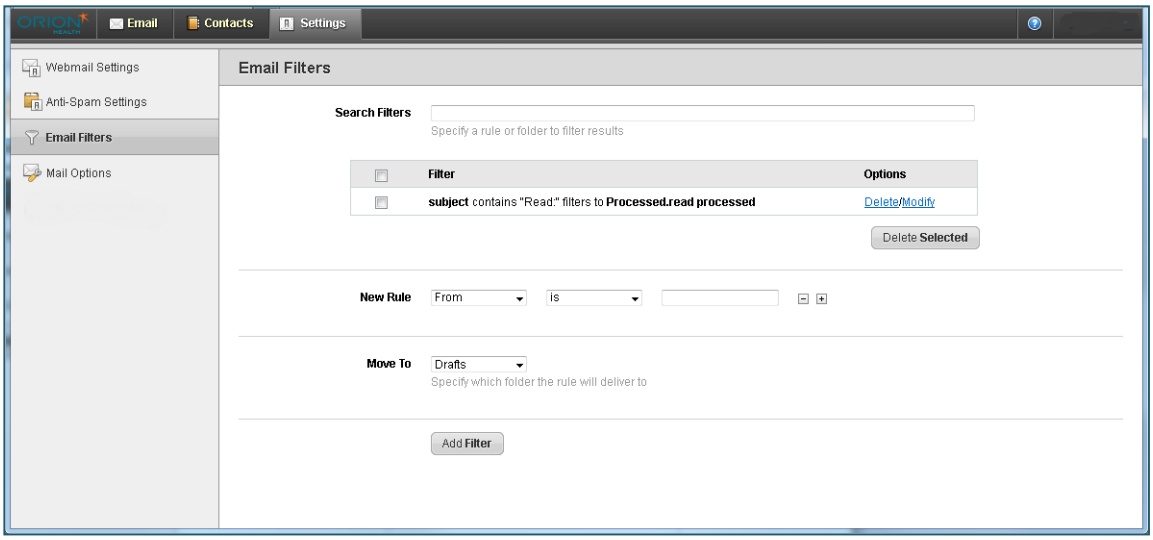
Email Filters

Email filters allow users to sort and manage emails into folders automatically.



Optional Email Filters

Optional email filters and settings are:

Add New Rule: Use this option to create email filters. Select from the drop down list 'From', 'To' or 'Subject'. Then select from second drop down list 'is', 'is not', 'contains' or 'does not contain'. In the text box enter criteria to be filtered, then specify which folder the rule will deliver to. For example, New Rule: 'From', 'is' and 'account@domain.com'. Move To: 'Trash'. This will move all emails received from account@domain.com to the trash folder. To add a new rule:

1. Navigate to **Settings>Email Filters**
2. Create a new rule using the dropdown lists
3. Click **Add Filter** to add the new rule

A user may also Delete or Modify a filter by selecting the rule and clicking on **Delete/Modify** button. Select the filter to delete (tick the box) and click **Delete Selected.**

Mail Options

Mail options in DSM include features such as auto-reply and notifications. The auto-reply feature allows th automatic reply to any received email. This feature may be useful if the user is unavailalbe to answer emails for a period of time. The notifications feature allows a user to be notified of a DSM email to a separate nominated email account which will direct the user to the DSM system. The notification messages do not contain message details, only a link to DSM. Sign-on and validation must occur prior to viewing the DSM email.

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Enable Notifications: Check this box to enable notification of new email to a non-Direct email address. Only one email account may be designated to forward notifications. (In most cases, you must enable Notifications through your Clinical Portal **My Details**. Where this screen is not available, you may enable Notifications through Secure Messaging.)

Notifications Address: Specify the email address to forward incoming notifications.

Enable Autoreply: Check this box to enable automatic reply (Vacation or Out of Office) to incoming messages.

Autoreply message: Enter the message to send to the senders of all incoming email.

After making changes to Notifications or Auto-Reply, click **Save Settings** button.

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Any questions regarding this documentation can be directed to:

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